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Partner Engagement Playbook

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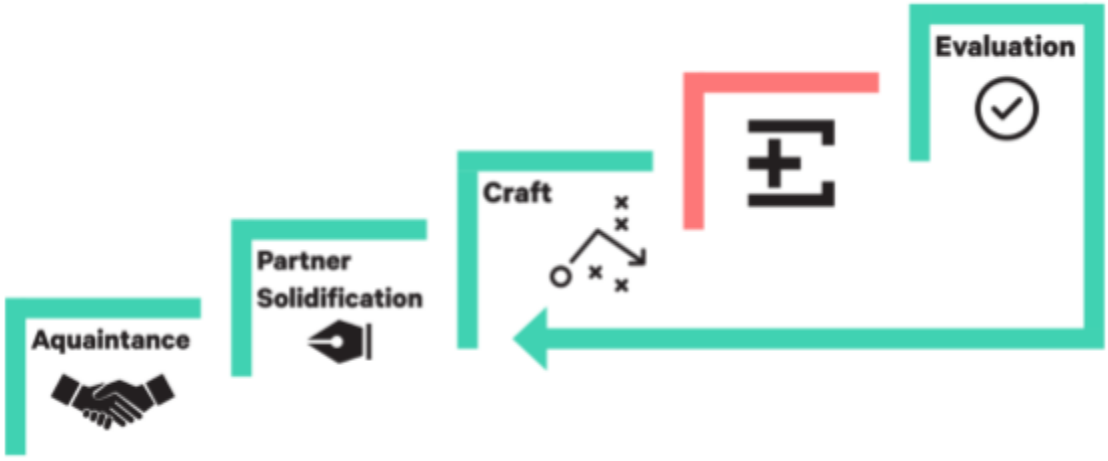
Partner Advancement Cycle

Embarc values the supportive and meaningful network of community partners who help to ensure our students achieve success. We aim to provide each partner with a mutually beneficial experience that involves a complete cycle of engagement and commitment toward the advancement of their mission and ours. Below are the phases and the various actions that exist within each phase.



Phase	*Components*
Acquaintance	Introductory Meeting ● Role/Contact Identification ● Mission Exchange ● Goal of Partnership
Partner Solidification	Collaboration & Communication Agreements ● Start MOU
Craft	**Explore Experience Options:** Highlight skills & talents, ideation, experience templates and/or **Experience Feedback:** Experience Walk Through, Tuning Protocol with Experience Rubric Teacher/Student Data Collection Overview ● Finalize MOU ● Book Experience Dates
Embarc(ed)	Embarc Staff Presence for 1st Run* ● Logistical Communication (Transportation, Food, etc) Partner Team Preparation* ● Student Group Overview* ● On-Site Reflection & Reciprocal Feedback* **Gradual release with the goal of partner collaborating with the teacher on experience to co-facilitate the experience*
Evaluation	Experience Observation & Feedback Cycle ● Review Teacher/Student Data Reciprocal Feedback ● Reflection on Mission & Partnership Goals Brainstorm Additional Experience Opportunities Explore Capacity for Next School Year ● MOU Renewal

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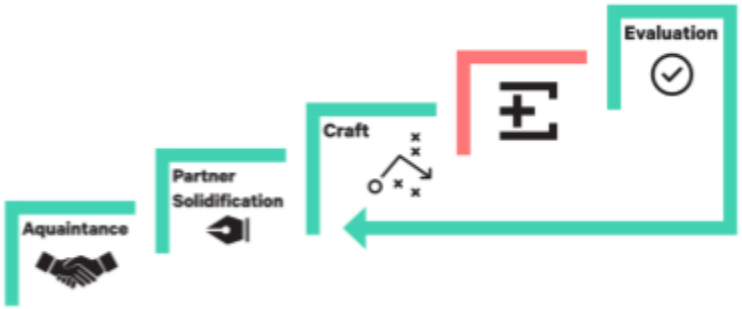

Partner Advancement Cycle:

Actions & Impact

Embarc values the supportive and meaningful network of community partners who help to ensure our students achieve success. We aim to provide each partner with a mutually beneficial experience that involves a complete cycle of engagement and commitment toward the advancement of their mission and ours. Below list the various actions that may occur in each phase and the impact it has on the partnership.

	Acquaintance	Partner Solidification	Craft	Embarc(ed)	Evaluation
ACTIONS	• Share Embarc's mission and impact • Share what Embarc values in our experiences • Unpack how the partner's mission/goals are connected • Assess the vitality of an experience partnership	• Establish collaboration and communication agreements • Establish partnership goals	• Share typical structure for experiences, best practices for experience creation, and examples of experiences • Facilitate Experience Creation • Provide Feedback along the creation process and any iterative experience processes/tools • Tune Experience with Embarc Process Reflection Tool or Rubric	• Share experience best practices for facilitation and experience pivots • Attend experience to support and observe: on 1st run and with new conditions • Facilitate Embarc orientation for additional adult volunteers	• Facilitate an analysis of student/teacher experience feedback • Conduct Experience Observation Cycle • Reflect and Debrief partnership
IMPACT	• Reciprocal relationship with experience partners • Best use of partnerships: experience partner and/or donor partner	• Trust in partnership • Alignment in goals	• Strengthen relationship with the partner • Higher quality student experience	• Strengthen relationship with the partner • Higher-quality experience facilitation • Prepared volunteering adults to support students in experiences	• Relationship with the partner centered around continually providing high-quality experiences for students • Improved student experiences and additional student experience options

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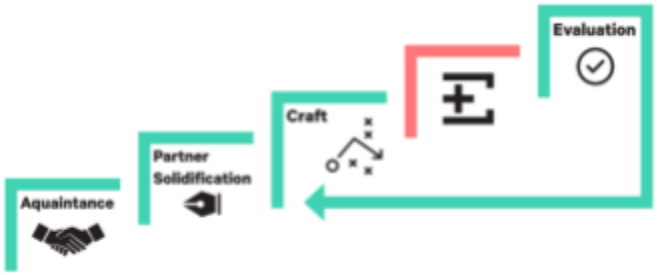
Acquaintance



Introductory Meeting

Role/Contact Identification

Mission Exchange

Goal of Partnership

1. **Use Embarc resources to be aware of any history between the partner and Embarc. Research and pre-determine the connection to Embarc's mission and social responsibility.** Refer to Partner Research Checklist & Questions for guidance.
2. **Connect with the primary contact and secure a first meeting** (via cold calling, connection through Embarc colleagues, existing partner referral, website inquiry, etc.)
3. **Prepare for 1st meeting**
    - Purposes of first meeting:
        - Exchange Missions
        - Pitch partnership with Embarc and/or determine partnership compatibility
        - Determine goals of our partnership
        - Start a positive relationship with partner
        - If moving forward, determine next steps for collaboration
    - Prepare agenda and accompanying materials:
        - Link to Master copy of "Who is Embarc":
            - This deck includes slides you can use when first meeting with a potential experience partner. Edit the deck to best fit the specific prospective partner.
            - This deck also has other accompanying materials for future meetings, so hide or delete those portions to not overwhelm partner in your first meeting (ie. Best Practices for Experience Facilication or Creation)
4. **Send follow-up email after 1st meeting: thank you, action items, next steps**

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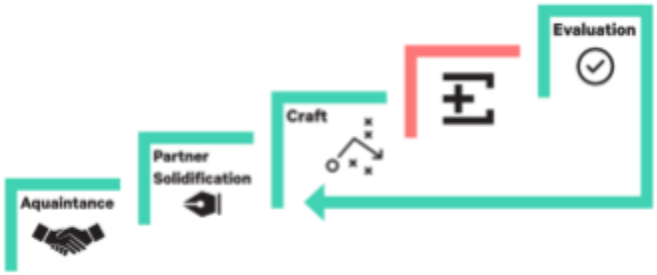
Partner Solidification



Collaboration & Communication Agreements

Start MOU

1. **Share the [Partner Advancement Cycle]**
2. **Establish Collaboration & Communication Agreements**
    - Determine tools to communicate with the partner regarding booking requests and meeting notes. See examples [Partner Collaboration Document & Resources] for various templates
    - How do they like to receive feedback?
3. **W9 & Certificate of Insurance:** Upload W9 & COI
    - **W9:** Embarc will collect a completed W-9 form for any vendor/partner providing services to Embarc. Embarc will issue a 1099 form to any vendor/partner that meets the IRS criteria* as an independent contractor or service provider and receives over $600 in a calendar year issued via check or direct deposit. .
    - **Certificate of Insurance:** As part of our standard procedures and to ensure the safety and security of all participants in our programming, we do request current Certificate of Insurance (COI) with Embarc named as Additional Insured. If requested by the partner, share Embarc's Certificate of Liability Insurance.
4. **Start MOU:** See [MOU Template]
    - Be clear on the booking process, pricing, payment method/deadlines, cancelation/rebooking policy, etc:
        - Who pays them, how much do we pay them, and how do they pay them?
        - How do we book experiences? What is the timeframe for booking with this partner? How do we cancel with this Partner? Are there any consequences for canceling with this Partner? Is the partner open to last-minute bookings?

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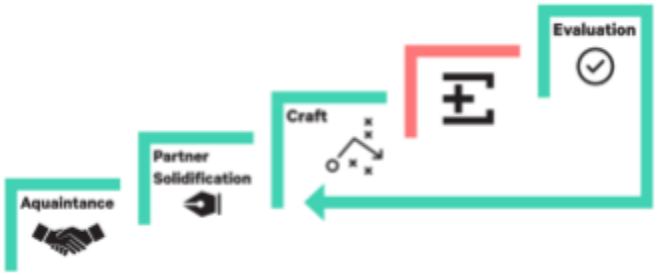
Craft



Explore Experience Options
and/or
Experience Feedback

Teacher/Student Data Collection Overview

Finalize MOU

Book Experience Dates

- **Explore & Ideate Experience Options:**
    - **Consider Highlighting Skills & Talents:** What do you do well? What are your passions? What are your talents?
    - **Consider having partner name their hopes/goals for a student experience:** What are your hopes for students when they engage in your space and with your team? OR What do you want students to get out of your experience?
    - **Ideate/Brainstorm with the experience partner:**
    - **Use named hopes/goals to elevate the experience ideas:** How might we elevate your hopes for students with your initial ideas?
    - See Partner Collaboration Document & Resources for experience ideation templates, experience design templates, and other resources.
        - See Other Experience Templates for additional templates
- **In future sessions, elevate the components of a strong Embarc experience with the experience partner to support refining experience ideas.** Both resources linked below are extensive, so consider the partners' history and schema and select the components that would be most beneficial for them.
    - Use the Experience Reflection Tool to introduce the components of a high-quality Embarc experience to the experience partner
    - Use the Experience Assessment Rubric to understand what the components of a high-quality Embarc experience look/sound/feel like.

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- **Experience Feedback Protocols.** You can engage the partner in processing and reflecting about their experience even prior to the first run of the experience using the below protocols.
    - Experience Walk Through Protocol
    - Tuning Protocol with Experience Reflection Tool

- **Emphasize Action Reflection Cycle:**
    - Guide the partner to create moments for reflection and support the partner in crafting reflection questions.
    - Direct the partner that they will start the end-of-day reflection and then pass it to the teacher to close the reflection. Encourage the partner to give the teacher a heads-up so the teacher can be ready.
    - See sample reflection questions
- **Familiarize the partner with the type of data we collect on experiences.** See student and teacher experience survey questions
- **Engage with the experience partner on their prior experience in providing accommodations and modifications for students on an experience to determine the growth areas to possibly engage/support the partner**
    - See Experience Accommodations & Modifications Resource
    - See Definitions - Cluster, IEP, Self-Contained Classrooms within General Education Programs - How does this impact our cohorting

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- **Embarc Tasks to Finalize Experience:**
    - **Create a new Partner Profile to create a New Experience**
    - **Submit an Experience Guide Request** for Embarc team to create accompanying curriculum for the experience
    - **Identify the best lunch option for the experience:**
        - Best Practices: Go Local! Keep a consistent lunch partner for the experience partner. If possible, make the partner the point of contact for lunch.
    - **If necessary, work with the partner to identify a primary and secondary Venue/Rental Space for the experience.** The experience partner should manage the vanue/retantal space for their experience.
    - **If the partner plans to conduct an in-school workshop, they need to complete CPS's level 2 volunteer application.**
    - **If applicable, retrieve the experience partner safety waiver**
        - Online waivers are good options, but encourage partner to also provide a paper copy of the waiver to make their experience accessible to all students.
    - **Share new experience partner and options with PM and Coaching Teams**

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Embarc(ed)

Embarc Staff Presence on 1st Run*
Logistical Communication*
Partner Team Preparation*
Student Group Overview*
On-Site Reflection & Reciprocal Feedback*
**Gradual release with the goal of partner collaborating with the teacher on experience to co-facilitate the experience*

- **Differentiated approach to Embarc(ed):**
    - **Returning Partners or Youth-Led or Pay to Play Partners**
        - Emphasize to partners that they are the owners of the experience
        - Emphasize to partners to leverage the lead teacher
        - Consider giving the experience partner "safe practice time" before you come to observe their experience.
        - After experience or a number of experiences, check in with the partner.
    - **First Run or Non-Youth Facing Partners**
        - If this is a first run for the partner, plan to be present to support/observe the experience.
        - ***Connect with the partner 1 week out.***
            - Reiterate their ownership of experience
            - Ask what support they need for their first run. Express we scaffold on-site support from Embarc staff. If needed, handle *some* logistics throughout the day.
            - Ask what they would like for you to pay attention as you observe their first run.
        - ***After Experience***
            - Check-out with purpose (leave in good standing, allow feedback if necessary)
            - Identify and connect with the partner on aspects of the experience that you supported that the partner can run on their own. In preparing for their next experience, connect with the partner on how they can own the experience with less support.
            - Send a gratitude email with student/teacher feedback quotes

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        - Coordinate with the teacher to have students send gratitude video or Thank You Post Cards. Refer to the after-lesson in the experience guide.

- **Emphasize and Reinforce Partner & Teacher Collaboration**
    - **Connect partner & teacher + Embarc support team via email weeks prior to the experience and schedule any needed collaboration or virtual meetings.** Coordinate this with Embarc support team prior to streamline communication.
    - **If needed, consider modeling for experience partner how to collaborate with teacher.**
- **Consider your Ways of Being on an experience while keeping students at the center**

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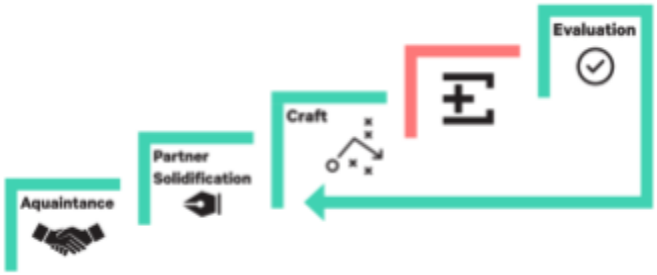
Evaluation



Experience Observation & Feedback Cycle
Review Teacher/Student Data
Reciprocal Feedback
Reflection on Mission & Partnership Goals
Brainstorm Additional Experience Opportunities
Explore Capacity for Next Year
MOU Renewal

- **Observe experience and provide feedback to the partner**
    - Connect with the partner prior, to communicate that you'll observe the experience and provide feedback. Ask the partner what they would like you to pay attention to.
    - Meet with the partner to provide feedback either right after the experience or within 72 hours. Consider the following resources
        - After Experience Reflection Questions
        - Experience Observation ORID Reflection Conversation
    - Follow-up via email with any action items
- **Engage the partner to Review Student & Teacher Feedback from our student and teacher surveys.**
- **Schedule and facilitate a Reflection using a Retrospective Process to reflect on the partnership between Embarc and partner.**
- **Request feedback from external experience partner.** See **Embarc annual survey questions** for a reference

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MISC Resources

Best Practices when Working with Development/Donor Experience Partners

How to use this resource:

- When stewarding a relationship with a potential partner or active partner who has or potentially has a donor relationship with Embarc, always refer back to our Partner Engagement playbook as you consider guiding the partner through the Partner Advancement Cycle.
- Below are additional steps/suggestions to consider at each phase of the Partner Engagement Cycle for these partnerships

Keeping the Development Team Updated

- Development Team and Program Team Leads do a monthly sync, so you'll be notified of any opportunities to share updates. You're welcome to join that meeting or you can just pass along the notes to team leads.
- Add the development team to any post-experience gratitude emails as well as to the calendar invites in the partner profile.
- If there are any special opportunities happening with the partner, notify Development so they are in the loop and can extend any additional gratitude or social media opportunities.

Acquaintance Stage *(additional steps/suggestions)*

- Development Partner Relationships: Check the list of the Development Team's partnerships to see if we already have a funding relationship with the partner. If we do have a funding relationship or potential funding relationship with a partner, collaborate with the Development Team; Review the Cross-Department Partner Collaboration Process for guidance.
- For initial meetings with potential donor partners, consider inviting a development team member to speak about Embarc's Impact and opportunities to support Embarc (including contributing financially) or consider including Impact slides on the Who is Embarc Template Deck
    - A question that the Development Team may ask: Can you share your corporate responsibility portfolio both on the grant side and impact side?

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Crafting Stage *(additional steps/suggestions)*

- **Community socials** are a great first experience for a new donor or potential donor partner because they provide a model of what a strong experience is and help the partner secure staff members to support the experience design, especially if you're initially working with just the HR team at a corporate partner. Community socials do require more work on our part, so it's best not to promise more than 1 a year. When communicating about the community social, communicating that a 1:1 ratio is important
    - **Materials to use to share about Community Social**
        - Community Social Video Jellyvision Video
        - Community Social One-Pager
    - **Planning Resources for Community Social**
        - Community Socials Folder with all resources with the most important below:
            - Community Social Facilitator's Guide
    - **Questions to intentionally pair partner with cohorts**
        - About how many volunteers do you hope to participate in the community social? We aim for a 1:1 student - volunteer ratio in our community socials
        - What types of positions do the volunteers hold?
        - What is the age range of the volunteers?
        - What is the general diversity make-up of your volunteers?
        - What percentage of volunteers have taken nontraditional routes to their current roles? (ie. community college, job training, etc)
        - How would you gauge your volunteer's readiness to engage with Chicago youth? We believe that experiences are for all students, but that also means that volunteers will see varying student readiness levels on an experience. Having a strong group of volunteers who are value-aligned allows Embarc to confidently send a group of students that may be more nervous when speaking to new adults and may be more uncomfortable when it comes to engaging in this meaningful experience that will support their development in a multitude of ways.

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EMBARCED *(additional steps/suggestions)*

- **Connecting partner & teacher:** Because there is a donor or potential donor relationship with the partner, only connect the partner and teacher via email/text if we are confident in our relationship with the teacher, so gather intel from the coach/pm supporting the teacher. Always include the Embarc support team members if connecting the partner and teacher.
- **Staff Support on Site & Partner Engagement Throughout the Year:** See Partner Engagement & Support Plan with Examples and consider PM Partner Engagement Actions & Experience Day Partner Supports based on the level of support needed
    - The goal is for our corporate partners to lead their experiences independent of Embarc support. Whenever we feel confident in our relationship with the teacher on the experience, we should give the partner safe practice collaborating with the teacher without Embarc staff present on the experience.
    - Some “other actions” that often apply to Donor/Development Partners Include the following:
        - Periodic check-in meetings or experience pre/debrief meetings as needed
        - **Check-in with coach/pm for any support as they prep teachers and encourage pm/coach of class to encourage the teacher to do gratitude cards:** The virtual gratitude card option in “after lesson” of all BDAs is a way to get student gratitude cards out to the partner soon after the experience. If you’re unable to secure student gratitude cards, you can still send a gratitude email with quotes from student surveys
        - Streamline communication/expectations with any Development Team Needs: Media Release Forms, Aux Board Prep, etc..
        - **Lead or co-lead w/partner the volunteer orientation**: If the experience involves new volunteers, a volunteer orientation is highly recommended. It can be facilitated virtually the week of or week before the experience. It usually takes 15 minutes. Connect with your POC to schedule volunteer orientations. Connect with the coach/pm pair to gather information about the class.
        - Facilitate Community Social or other Embarc-led elements
    - **Other Actions not included in the example Engagement Support Plan with Examples**
        - **Communicating our belief that experiences are for all students and attending to those mindsets.** Traditionally partners that fit this category usually get to only engage with specific demographics of students. Embarc provides students with experiences during the school day because we believe that these rich experiences are for all

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students. It is essential for our staff to communicate and reiterate our belief that experiences are for all students and invite the partner to prepare to meet students where they are so they can truly join us in our work around providing strong developmental experiences. This also requires our team to be mindful and coach around adult mindsets whenever they arise.

- **Reminding partner of the difference between the class roster and average attendance:** Before the experience, remind the partner of the roster attendance and average attendance so they can be ready to pivot based on actual student numbers. Sometimes, partners may want a “cut-off” so secure accurate names; however, we want to encourage the partner to make their experience accessible and allow students to still attend if they can only bring their permission slip on the day of the trip.
- **Arrival Logistics:** Before the experience and if required, submit names of students and chaperones for building security. On the morning of the experience, text teacher to request their ETA, and number of students, double check the chaperone names. Communicate any chaperone changes to the partner and build security. Communicate student numbers and ETA to the partner.

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